

# CareerTech Information Management System (CTIMS)

## EDI Change Request Guidebook

IMD

*career***tech**

Revised August 27, 2019

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## EDI Contacts

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**NOTE:** For questions about specific EDI requirements or what content you need to input or attach with your worksheet, contact your ODCTE Regional Coordinator.

If you have questions about submitting information in CTIMS, please contact CTIMS Support at [CTIMSSupport@careertech.ok.gov](mailto:CTIMSSupport@careertech.ok.gov).

## Help and Troubleshooting

If you do not have a CTIMS account set up or are having trouble with the navigation or software, contact CTIMSSupport@careertech.ok.gov. Send a message describing your problem. Include your school name and your telephone number and we will contact you.

If you have forgotten your password, click the **Forgot your password?** link to reset.

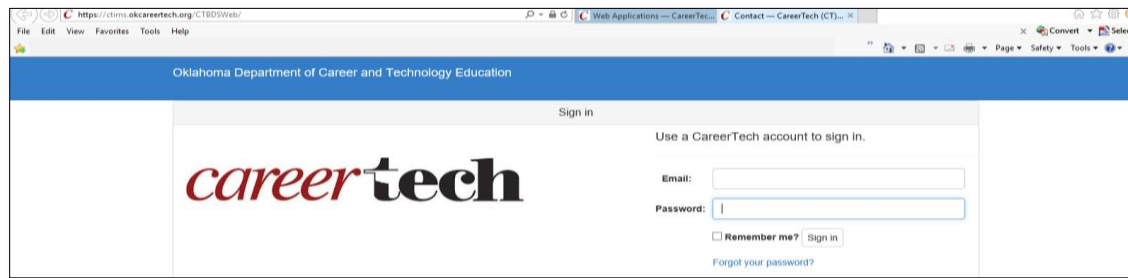
For helpful tips, see the [Tips and Tricks](#) section of this document.

### IMPORTANT:

Please log into CTIMS using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.

## Logging into CTIMS

Sign in using your school email and CTIMS password at <https://ctims.okcareertech.org/CTBDSWeb>

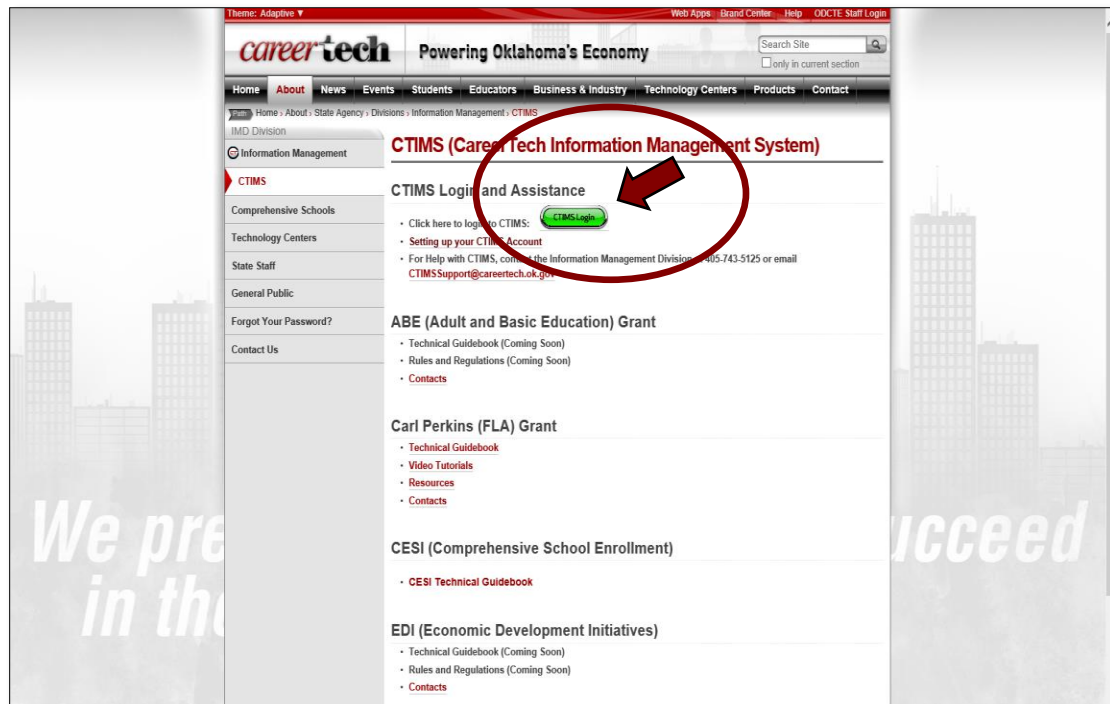


Or,

Go to <http://www.okcareertech.org/> and select **CTIMS** in the red bar at the top of the page. Do not select the ODCTE Staff Login selection in the red bar. This is not the CTIMS login.



On the CTIMS website, select the green **CTIMS Login** button.



## EDI Change Request Process

A change request process is to edit/change a Worksheet or budget within a worksheet before it has been fully approved by the ODCTE staff. The Change Request can be initiated by any of the local roles and will go through the regular approval process.

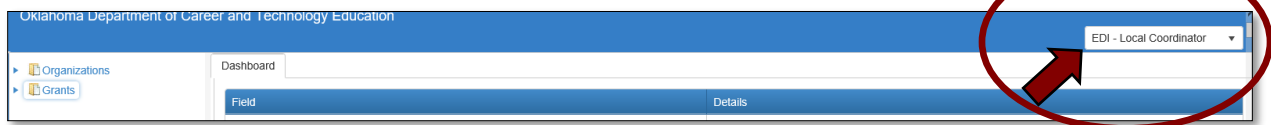
### Logging in and Accessing the Worksheet

After a Worksheet is submitted for approval, you must go through the **Change Request Process** to make any changes.

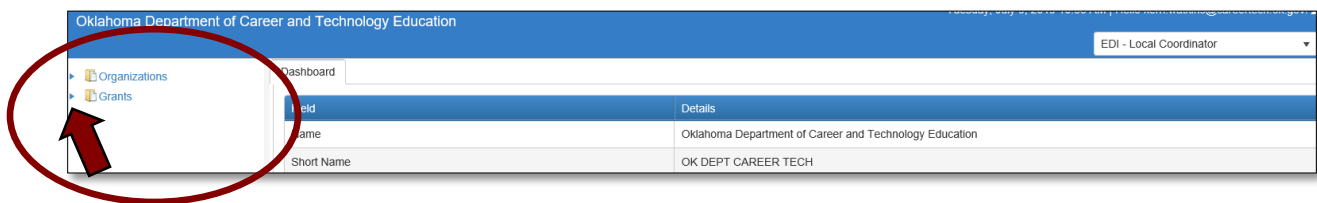
- Sign in at <https://ctims.okcareertech.org/CTBDSWeb/> using your school email and CTIMS password.

**NOTE:** Please log in using Microsoft Explorer version 11 or higher. CTIMS is currently not compatible with other browsers.

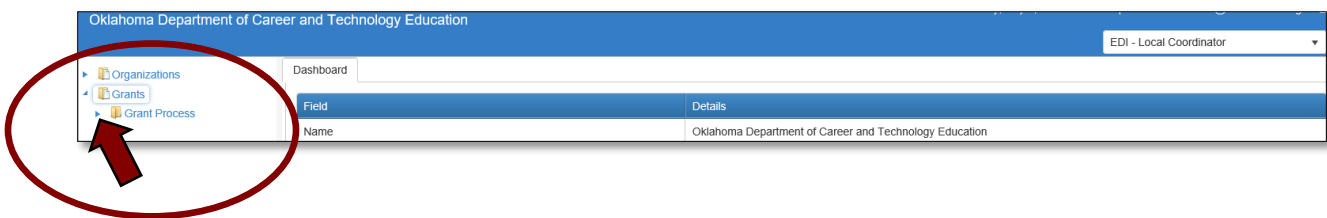
- Verify that you are signed in with the appropriate role in the top right-hand corner. Use the drop-down arrow to select your EDI role.



- Click the arrow |▶ next to **Grants** on left navigation.

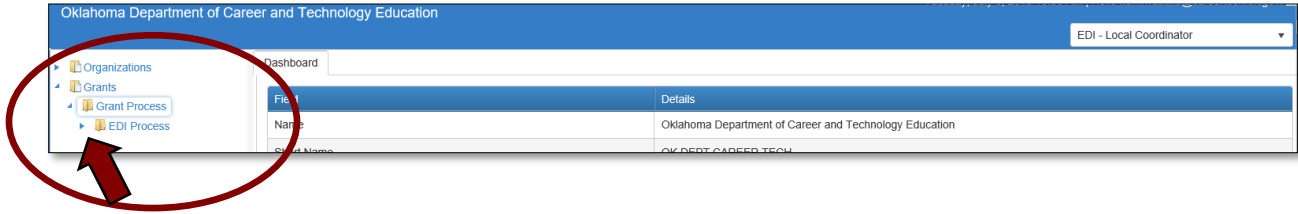


- Click the arrow |▶ next to **Grant Process** on left navigation.





- Click the arrow ► next to **EDI Process** on left navigation.



- Complete the EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up form. The tagged numbers on the screenshot correspond to the instruction steps below. Many of these fields will automatically display based on your organization login credentials.
1. Verify **Fiscal Calendar Year\*** to make sure correct year is showing.
  2. Verify **Grant Fund Type\*** is set to EDI.
  3. Select your correct **Organization Type** from the drop-down menu.
  4. Select your **Organization\*** by typing in the first three characters of the name.
  5. Verify the **Organization District\*** if it does not automatically appear after typing the first three letters of your Organization name or if you need to select a different Organization District.
  6. Select a **Program Initiative\***.
  7. **Approval Function Type** will remain as **All**.
  8. **Filter on Status** will remain as **All**.
  9. Select the **Search** button to search for any outstanding worksheets/applications that need your approval.

**NOTE:** A red asterisk (\*) indicates a required field.

## Initiating and Completing the Change Request

**1.1** - After clicking the **Search** button, the worksheet/applications that are in the approval process will be listed. Select the worksheet number to open it.

oma Department of Career and Technology Education

EDI - Local BIS Director

Dashboard | EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up

EDI Grant Fund Worksheets List

Fiscal Calendar Year: 2016-2017 | Grant Fund Type: EDI

Organization Type: Tech Center Districts | Organization: Sample Technology Center

Organization District: Sample Technology Center | Program Initiative: Economic Development - Firefighter (Type 83)

Approval Function Type: All | Filter on Status: All | Search

Save changes | Cancel changes | Export to Excel

Act...	Provider Name	Worksheet Approval Curre...	Worksheet...	Worksheet	Agreement	Agreement
+	Sample Technology Center	EDI Local BIS Director - 2n...	05/16/201...	WS-1617-EDI-EDI-FIREFTR-444-16X1117...		New-Draft

**1.2** - To make changes to your Worksheet/Application or Budget, select **Change Request**.

Department of Career and Technology Education

Monday, June 26, 2017 3:58 PM | Hello Denise.Christy@careertech.ok.gov

EDI - Local BIS Coordinator

EDI Grant Submit Worksheet - Step 3

+ Provider Organization Details | Refresh | Worksheet Summary | One Step Back | Save as Draft | Submit For Approval | Change Request

+ Basic Client Information

+ Project Details

- Budget Line Items

Grant Allocation

Sub Award Allocation	Worksheet Budgeted	Agreement Budgeted	Fully Approved Invoiced	Agreement Unbudgeted = (Allocated - Agrmt. Budgeted)	Remaining to Invoice
\$2,007.20	\$550.00	\$0.00	\$0.00	\$2,007.20	\$0.00

Add Budget Line | Remove Budget Line | Cancel Budget Line Changes

Budget Line(OCAS CODE) Program - Function - Object	Budget Line Desc.	Req. Units	Req. Unit Cost	Req. Unit Type	Work Sheet Total	Req. Total	Matched
	Training	3.00	\$100.00	Cost Per Class	\$300.00	\$0.00	
	Books	10.00	\$10.00	Cost Per Each	\$100.00	\$0.00	
	supplies	150.00	\$1.00	Cost Per Class	\$150.00	\$0.00	

**1.3** - The Change Request process cancels the worksheet/application approval process. Click **OK** to continue.

Department of Career and Technology Education

EDI - Local BIS Coordinator

EDI Grant Submit Worksheet - Step 3

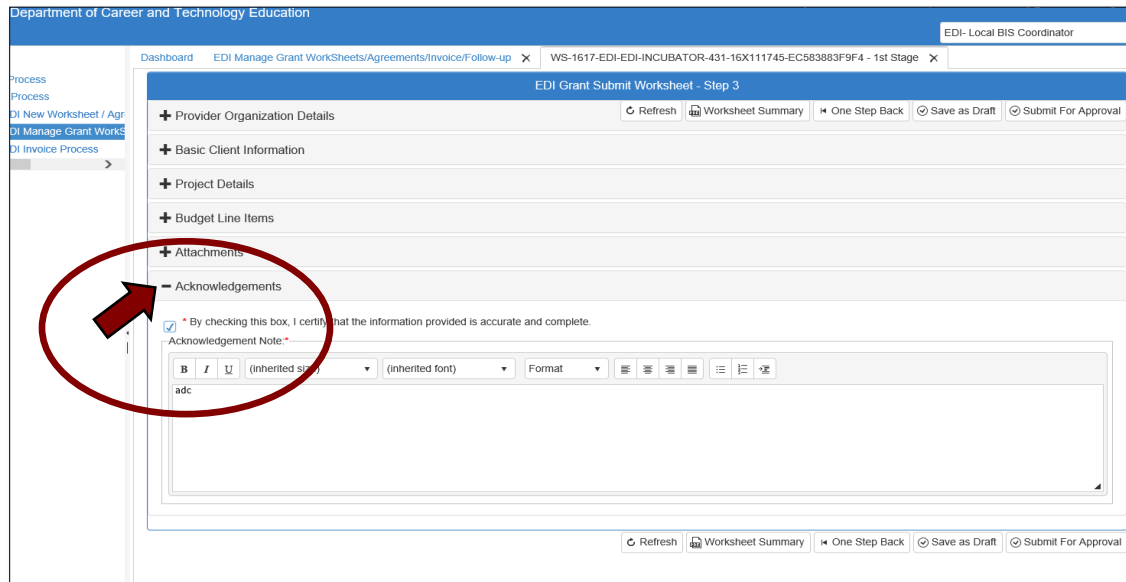
Details

Change Request

You are going to cancel the approval process and initiating the change request process. Are you sure?

Cancel | OK

**1.4** - You can now make changes to the **Project Details** section or **Budget Line Items** section. After making the changes, go to the **Acknowledgement** section and check the certification box and add an acknowledgment note.



Department of Career and Technology Education

EDI- Local BIS Coordinator

Dashboard EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up WS-1617-EDI-EDI-INCUBATOR-431-16X111745-EC583883F9F4 - 1st Stage

EDI Grant Submit Worksheet - Step 3

Provider Organization Details Refresh Worksheet Summary One Step Back Save as Draft Submit For Approval

Basic Client Information

Project Details

Budget Line Items

Attachments

Acknowledgements

☒ By checking this box, I certify that the information provided is accurate and complete.

Acknowledgement Note \*

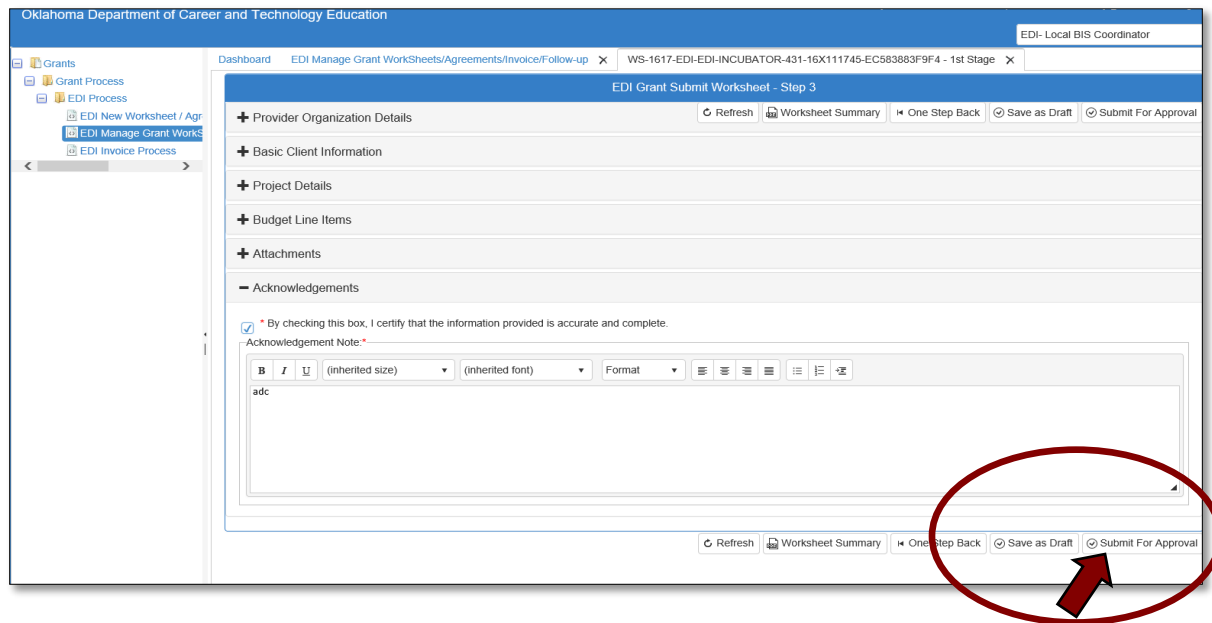
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adc

Refresh Worksheet Summary One Step Back Save as Draft Submit For Approval

**NOTE:** Once the changes, or partial changes have been made, you can Save as Draft by clicking **Save as Draft**. This will save the changes to the worksheet without summing to the next approval stage, so you can return and finish at a later time.

**1.5** - Select **Submit for Approval**.



Oklahoma Department of Career and Technology Education

EDI- Local BIS Coordinator

Dashboard EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up WS-1617-EDI-EDI-INCUBATOR-431-16X111745-EC583883F9F4 - 1st Stage

EDI Grant Submit Worksheet - Step 3

Provider Organization Details Refresh Worksheet Summary One Step Back Save as Draft Submit For Approval

Basic Client Information

Project Details

Budget Line Items

Attachments

Acknowledgements

☒ By checking this box, I certify that the information provided is accurate and complete.

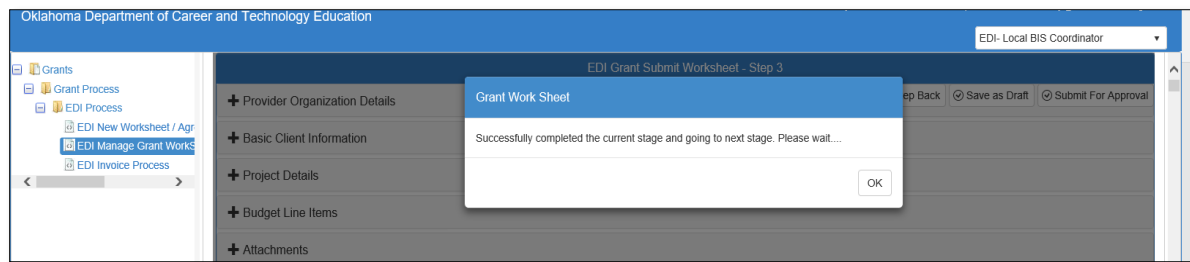
Acknowledgement Note \*

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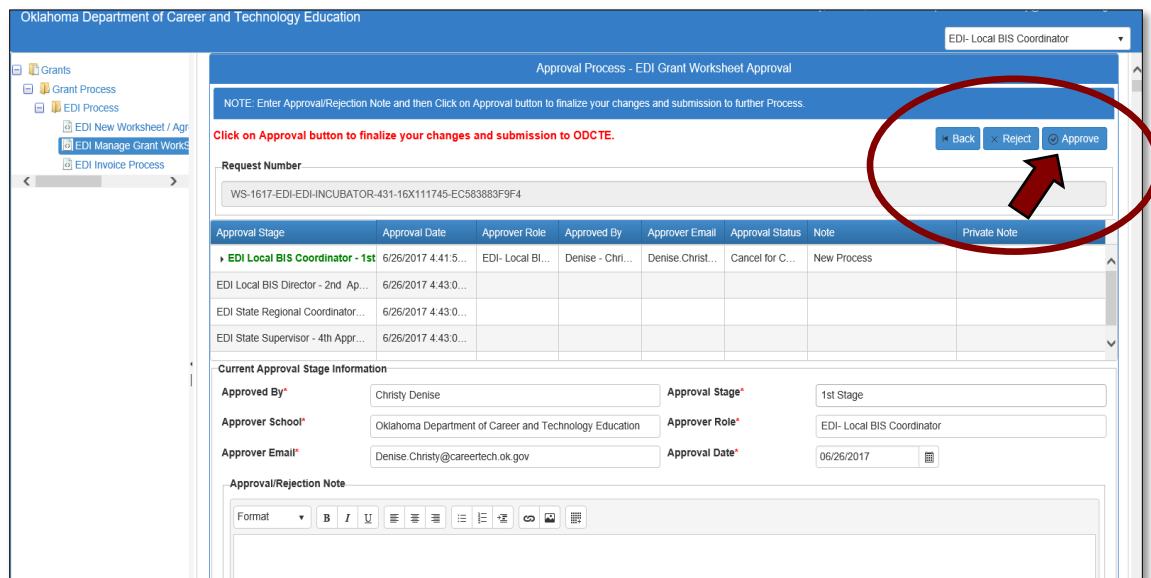
adc

Refresh Worksheet Summary One Step Back Save as Draft Submit For Approval

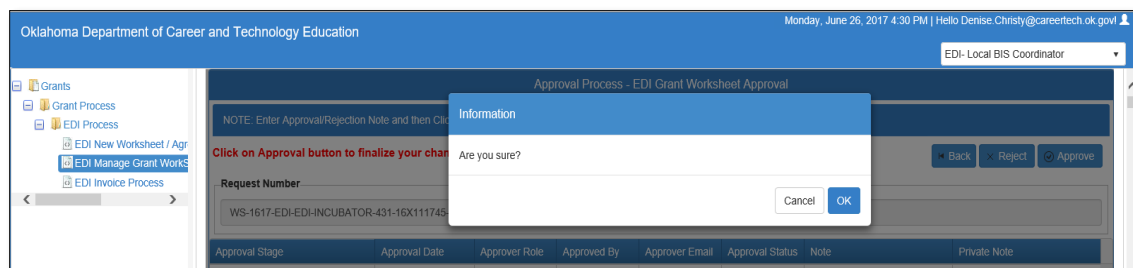
## 1.6 - Click OK.



## 1.7 - Select Approve to send changes to next approval stage.



## 1.8 - Click OK at the “Are you sure?” message.

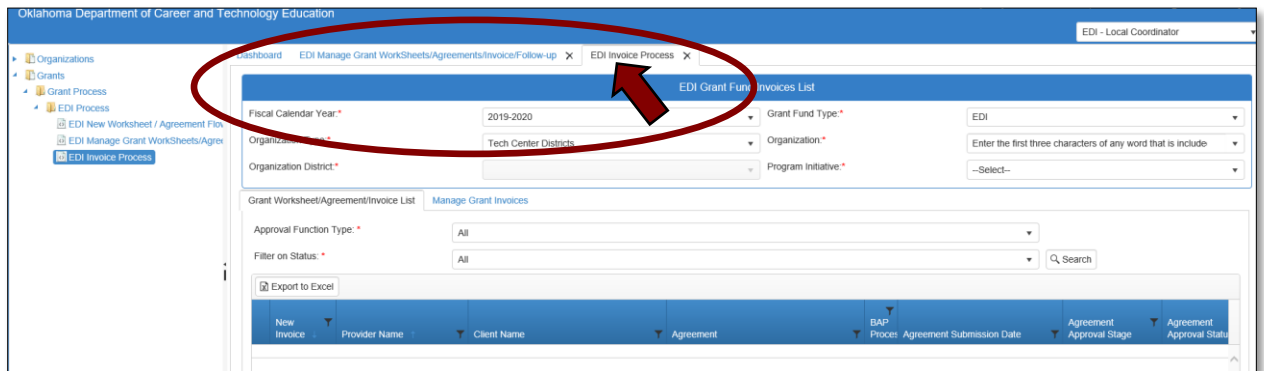




The worksheet will go back through the regular approval process.

## TIPS and Tricks

### CTIMS Helpful Hints

- There are scroll bars located at the bottom and right of some of the screens in CTIMS. If you cannot see all of the information on a screen, go to the right or bottom of the screen and use the scroll bar to see navigate over to view additional columns and rows.
- You can flip between screens or tabs in CTIMS. Click on any open tab at the top of your screen to toggle between them.



- There are tabs within screens in CTIMS. Look for these tabs to view a different screen or more information. For example, within the Invoice Process, on the EDI Grand Fund Invoices List screen, there are two tabs: Grant Worksheet/Agreement/Invoice List and Manage Grant Invoices. You can flip between the two tabs within this screen.
- Many sections in CTIMS can be expanded in order to view more detailed information by clicking on the +(plus) sign or an arrow ► next to the section header or line (row).
- Hold down the Ctrl key and click on the + or – keys to zoom in or out.
- Do not use the Print icon  to print documentation. Use the save icon  to download a pdf, then you can save it to your computer or print the pdf.
- You can only have 10 tabs open at one time. To close tabs, click on the ✕ on the right side of the tab you wish to close, then confirm that you would like to close by clicking OK on the confirmation screen.

## Where's my Worksheet, Agreement or Invoice?

To find out what approval stage your worksheet, agreement or invoice is in, you can take the following steps:

### **Worksheets/Agreements**

- On the navigation on the left, go to Grants>Grant Process>EDI Process>then click on EDI Manage Grant Worksheets/Agreements/Invoice/Follow-up.
- Complete the EDI Grant Fund Worksheets List form and click Search.
- The list of worksheets/agreements will populate. In the Agreement Approval Current State column you can see at which stage the worksheet/agreement is currently in.
- You can also click on the ► on the left, on the worksheet row to view the worksheet and agreement summaries. This includes approval/rejection notes for each approval stage.

NOTE: If the worksheet is still in the New Draft stage, the approval summary will be blank.

### **Invoices**

- On the navigation on the left, go to Grants>Grant Process>EDI Process>then click on EDI Invoice Process.
- Complete the EDI Grant Fund Invoices List form and click Search.
- There are 2 tabs: Grant Worksheet/Agreement/Invoice List and Manage Grant Invoices. Click on the Manage Grant Invoices tab.
- You can use the scroll bar at the bottom to scroll to the right to see the Current Approval Stage column.
- Or you can click on the ► on the left, on the invoice row to view the Invoice Approval Summary. This includes approval/rejection notes.

## Where are the Funds?

- If you have created a new invoice and added a dollar amount to a line item, that amount will be subtracted from your balance on the dashboard. This includes a draft of an invoice that has not been submitted for approval.
- If \$0.00 are available in a line item to invoice, the line item will not appear on a new invoice.